



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Scheduled Report - public distribution

Date: 12/1/1999

GAIN Report #GR9034

Greece

Exporter Guide

1999

Prepared by:

Elizabeth Berry

U.S. Embassy

Drafted by:

Danae Synodinou

Report Highlights: Greece is an import dependent country, with total CY1998 agricultural imports amounting to \$4.6 billion. Greece, having been selected to host the 2004 Olympics, with tourism expected to double to 25 million people at the time of the games, presents exciting marketing opportunities for U.S. food items. In addition to the expected surge in tourism, consolidation in the grocery sector and an increase in women working outside the home should provide a boost to food imports from the U.S. such as frozen foods, seafood, nuts, snack foods, pulses, beer and wine.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
Athens [GR1], GR

SECTION I. MARKET OVERVIEW

Greece, a member of the European Union (EU), is in its sixth year of a convergence program designed to meet European Monetary Union (EMU) entry requirements. The government maintained its restrictive economic policy for yet another year in 1998. Monetary policy was mainly directed against inflationary pressures, particularly after the drachma devaluation in March 1998, so as to bring inflation in line with the EU average. The government is following a fiscal plan aimed at ensuring Greece's accession to the EMU on January 1, 2001. Inflation, which gradually fell from 3.7 percent in January to 2.1 percent in July, may fall even further to 1.5 to 1.8 percent, in response to measures to restrict credit expansion. The annual inflation rate was 2% in September, according to the National Statistical Service of Greece.

On March 16, 1998, the drachma entered the Exchange Rate Mechanism (EMS), at a rate of Drs 357 to the ECU, (with a devaluation of the drachma by 12.3 percent) with the other 3 EU countries which had failed to meet EMU entry requirements. On January 1, 1999, the drachma entered the Exchange Rate Mechanism -II at a rate of Drs. 353.109 to the Euro. It is anticipated that in March 2000, with the completion of two years since Greece had entered the EMS, the exchange rate criterion will also have been satisfied. The economy also is expected to grow vigorously during the two year period 1999-2000. The continuing stabilization of the Greek economy and the prospects for business activity in the Balkans now that peace has been restored in the area, should lead to an attraction of foreign investors to Greece. Moreover, the role Greece is expected to play in the future as a commercial and financial center in the broader Balkan area, should lead to a notable rise in trade between Greece and neighboring countries. In addition, Greece's geographical advantage as the only member of the EU located in the South-Eastern Europe, and a bridge to the Black Sea and Middle Eastern countries is anticipated to provide an incentive for the growth of business opportunities.

Greece is an import dependent country. The National Statistical Service reports CY 1998 total imports amounting to \$28.6 billion, of which \$4.6 billion were agricultural products, while CY 1998 exports were \$10.3 billion, of which \$3.5 billion were agricultural products. The unemployment rate was 10.4 percent. The average per capita income of \$11,500 makes Greek consumers price conscious.

The retail sales index (Jan 1998 = 100) rose by 6% in the 1st semester of 1999 over the same period in 1998 to 319. The volume of retail sales during the same period rose by 3.7%. The volume of food sales in particular, rose by 3.7%.

Greece, having been selected as the host of the 2004 Olympic games, has already undertaken projects for rapid modernization and development as well as international promotion. Tourism is expected to increase from the current 11 million visitors per year to over 25 million at the time of the games. This will have a dramatic impact on Greece's food import requirements.

The food sector, the most dynamic and growing sector in Greece, has increased significantly the last decade. There are about 850 industrial groups involved in the food and beverage production, with sales of \$7.2 billion, and a net income of \$403 million. Greece provides good potential for U.S. food products including frozen foods, seafood, meat, nuts and dried fruits, snacks, wine, beer and cereals. Greek food habits remain traditional with a heavy emphasis on the Mediterranean diet. However, the combined impact of new trends in diet, more women working outside the home, and more disposable income, are resulting in growing opportunities for convenience foods, fast food restaurants and pizza chains, and ethnic foods, in addition to the traditional inexpensive tavernas.

| Advantages | Challenges |
|------------|------------|
|------------|------------|

| | |
|--|---|
| Increased demand for food products due to the upcoming Olympics | A limited number of Greek importers and distributors are aware of the variety of the U.S. food products that can be exported to Greece. - High marketing costs to increase consumer awareness. |
| The HRI is expanding. | High value U.S. products are underrepresented in the hotel/cruise ship subsector due the seasonal nature of these enterprises, and their need to purchase in small quantities. - Freight forwarders/consolidators need to help in resolving this weakness. |
| Greek consumers favor U.S. products because of better quality and wider variety | Average tariff levels remain high increasing products' price. GMO labeling requirements could result in consumer concern. |

SECTION II. EXPORTER BUSINESS TIPS

Eighty per cent of the Greece's import trade is handled through sales agents or distributors. Sales agents operate on a purchase basis without affecting imports on their own account. Agency agreements are not required to be exclusive and can cover any time period. Distributors operate on a wholesale (and in some cases, retail) basis with exclusive sales rights for certain districts or for the entire country. Retail and wholesale trade is characterized by small, family-owned and operated businesses, each of which deals in a narrow range of goods. There are 300,000 trading establishments in Greece. There are 7,000 corporations and limited liability companies engaged in wholesale trade and 3,200 corporations and limited liability companies handling retail trade.

There are several department stores and supermarkets. A few department stores have closed due to failure to adjust new shopping trends. Those that remain in business operate like small shopping centers where the "shop-within-a-shop" concept is applied.

Changes in the supermarket sector are rapid. The entry of foreign chains, especially that of hard discount stores, has marked a new period of intense competition, the first signs of which became evident in 1998 and will become more evident in 1999. The new conditions of competition have hurt primarily Greek suppliers and retailers, who are quite uneasy about developments in the sector.

The growth of supermarkets continued last year. Despite the closing down of six small and medium size chains the number of supermarkets has increased by 8.5% in 1998 compared to 1997. There are 2,249 supermarket units. Chains operated 1,496 supermarkets in 1998 compared to 1,320 in 1997. This overabundance of stores (there are small cities with as many as 25 supermarkets) combined with stagnation in consumption is driving the sector into crisis. Supermarkets belonging to chains represent 66.3% of the total number of super markets. A year ago this ratio was 63%.

The twenty five biggest food retailing super market chains had a rather positive year in 1998. They managed to increase their collective sales by 9.1% last year in a stagnant food market, after a larger increase of 10.8% in 1997. The biggest single firm had a turnover of drs 190.3 billion (\$61 bln). The net margin percentage recorded in 1998 was 1.4% on the sales turnover, from 1.2% a year earlier.

During 1998 and 1999 foreign discount supermarket chains began to establishe themselves in Greece. Lidl inaugurated a

store in Northern Greece, having development plans to include Athens, where the chain's main competitor, Dia (having already 110 shops), is very active. Aldi is also expected to enter the market soon. Another multinational which is presently in the final phase of preparatory work is Carrefour.

As Greek consumers' needs evolves, their food purchase patterns are changing. The average size household is 2.6 persons, compared to 3.5 persons 10 years earlier, while 22% of the population is over 60 years old. Increased disposable income, larger numbers of dual-income families, increase in one-member households, and increase in one-parent households have resulted in expanded demand for consumer-ready products and restaurant meals.

The average consumer living in Athens or Thessaloniki, the second large city, visits the supermarket twice a week to purchase food and household goods. Sixteen percent of the consumers buy fruits and vegetables from the supermarket, 16 percent buy non-fresh food, 31 percent buy food, beverages, cosmetics and soaps, and 37 percent buy all products from the supermarket. The fairly low per capita income average of \$11,500 makes product price a key determinant of the consumer's choice between products and brands. However, quality is of great importance in the selection of food items. Greek households spend 22.5% of their incomes in food purchases, and 17% in rent or house maintenance, while the expense for dining out (out of the food expenses account), was 30% in 1998/99, compared with 17% in 1982. Consumer loyalty to well-known brands, which have dominated the market for a number of years, seems to be weakening due to the economic recession and to an increase in lower-priced private label products. Packaging appears to be the secondary factor affecting demand, followed by special offers for various products.

Small stores that cater to inhabitants' every day needs exist throughout the neighbourhoods of Athens and its suburbs. They are beverage shops, mini markets, kiosks, most of which have grown into small general stores. The main reason for their existence is to cater to the emergency needs of an area's inhabitants for products of everyday consumption, particularly when big stores are closed or when it is impractical to pay a visit to the supermarket. These shops can be called "small points of sale" and constitute an integral traditional part of the Greek market.

During the last year sales of private label brands spread very rapidly and are expected to occupy bigger shares in the current year. Practically all chains have their own private labels on their shelves. It is estimated that private labels cover 7-8% of total sales and this share is expected to increase to 10% in the next couple of years representing a sales level of 140-160 billion drachmas. According to a recent study, seven chains that were surveyed carried two thousand private label items and they had plans to develop another 670 private labels. It is estimated that all big chains together carry more than five thousand private labels.

Food safety matters, although not neglected by the average consumer, are still not major issues compared with other EU countries. Food products including GMO ingredients should indicate the presence of genetically modified organisms on their labels, based on EU rules. Bulk ingredients, such as vegetable oil must be accompanied by certification by the exporter that the product includes only EU-approved varieties. If the exporter made a good faith effort to exclude GMO's entirely, this too should be certified. Non EU-approved GMO varieties are not admissible. The GOG will conduct its own testing to verify exporter certification.

Greece, as a member of the European Union (EU), fully complies in general with its regulations. Labeling and ingredient legislation for all food and agricultural products is based on EU rules and regulations. Additionally, Greece maintains specific labeling and ingredient rules for some food products under the Greek Food Code. Greece requires that labels be in the Greek language. Multi-language labels are accepted.

Exporters are advised to have an experienced agent or joint venture partner, with a suitable background, experience and extensive sales/service network, who can offer full support to the end-user.

Food and beverage products of U.S. origin complying with EU rules and regulations would not require special permits (nor they are subject to special rules or regulations) for commercialization in Greece. However, GMO products are handled quite strictly (see above). If a U.S. food product, other than food supplements, conforms to any single EU member state's rules and regulations it can then be transhipped and sold in all other EU members.

For additional information on Import Regulations and Procedures, please refer to our FAIRS report, GR9020 dtd 8/4/99.

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

The food and beverage sector is the most dynamic and most export-oriented of all Greek production sectors, holding a 20.4% share of total Greek exports. With some of the biggest and most advanced companies in the country participating in the sector, it is poised for further developments. The long-term process of technological modernization, the adoption of international business practices, the concentration among powerful groups, the expansion of their infrastructure into new markets and the production of high quality products create the certainty that Greece's food companies will remain at the peak of the country's growth effort and will continue to play a key economic role in Greece. Despite the long recession and the uncertainty that has characterized Greece's economic policy, quite a number of food companies have adapted to the competitive demands of the times. New, promising opportunities evolving with the opening of northern borders and Greece's impending accession to the Economic and Monetary Union, would likely be exploited by food companies. The family structure of many Greek companies will try to adapt to new, advanced forms of organization to better exploit the opportunities of the market. The use of electronic trade and new techniques and tools is another goal of food enterprises.

The Hotel and Restaurant industry sector is another growing sector especially in view of the upcoming 2004 Olympics, when tourism is expected to double to 25 million people. The total food service market is forecast to grow at an annual rate of 1.5% through 2000. The market is then expected to increase dramatically between 2000 and 2005. The big fast food chains have increased sales and profits over the last few years by 10 to 15%. This reflects consumers' increased preference for ready-made foods. Fast food chains are expected to keep on growing and to expand into new areas of activity, such as airports, cruise ships and trains.

Significant trends and market information on targeted product categories include:

Frozen Foods: One of the growing markets in Greece is the frozen food market, especially frozen vegetables, french fries, dough, fish, poultry, meat and meat products. Now, that about 30% of the families, particularly in Greece's larger cities have microwaves and freezers, the demand for convenience foods in households is expected to spread. The production and consumption of frozen meals is low compared to other European countries. The total market size is estimated at 3,500 tons, of which 650 tons are precooked, imported fish. Limited advertisement of the products, except of fish products, as well as poor consumer acceptance, has resulted in limited consumption. However, the modern life style coupled with the expected increase in tourism provide increased potential for U.S. frozen products. The average annual per capita consumption of frozen foods is 17.4 kgs compared to 15.9 a year earlier. The size of the frozen food market is estimated at \$300 million.

Meat Market: The sector holds a very important position in overall food production, taking into account the fact that meat constitutes one of the most basic foodstuffs consumed by Greeks, with around 31% of private domestic food consumption (in value terms) represented by meat. The Greek meat market has potential for further growth. The role of the large, vertically integrated units will be instrumental, while consolidation currently taking place in the whole spectrum of production and trade, constitutes the means for the sector's reform. However, improvements are necessary in primary production. The average per capita meat consumption in 1997 was 88.4 kgs compared to 80.5 kgs in 1990. First in consumers' preference is pork meat, (29%), followed by beef (22.4%). Chicken meat comes third in the consumers' preference (20.4%). The 1997 Greek meat production was 570,892 tons while in 1985 it was 560,351 tons. CY 1997

imports, 340,954 tons, amounted drachmae 207 million, \$ 667,000.

The Greek cooked pork industry has been on a steady growth path ever since the middle of the past decade. Being a sector that includes exceptionally dynamic enterprises, among the most modern and competitive in Europe, the Greek cooked meat industry is already playing an important role in neighbouring countries as well. The domestic consumption in 1998 was 75,000 tons, 85% of which was produced by locally-raised animals.

Department store and supermarket meat sections "meat hypermarkets" and "meat boutiques" are gaining ground at the expense of traditional butcher shops. Demand for U.S. beef within the HRI sector is high, pending resolution of the hormone issue. However, meat destined for cruise ship use is not subject to EU restrictions.

Tree Nuts: Consumption trends in Greece show a gradual increase in tree nut utilization in the food and confectionary industry as well as the snack food sector. Domestic annual almond consumption is approximately 13,000 MT and slowly increasing. Greece is among the largest per capita tree-nut consumers in the world (8 kgs per capita consumption). Total nut consumption has risen almost 22% since 1991 and is expected to continue growing through the Olympic Games in 2004. Almond consumption represents 24% of total nut consumption. CY 1997 almonds imports amounted \$15.6 mln, mostly from the U.S. and Spain. CY 1997 pistachio imports amounted \$11.0 mln. Pistachio demand as a snack food and in the confectionary and ice cream industries is growing. Walnuts and pecans are also imported in small amounts.

Dairy products constitute one of the most important categories of foodstuffs in domestic consumption. Their share of total food consumption exceeds 17% and is increasing annually. The companies operating in the dairy sector are among the biggest in the Greek food industry. Consumption of milk and milk products in the coming years is expected to be very favorable due to their recognized high nutritional value. Total milk consumption in 1996 was 613 MT, of which 57% was fresh. Cheese products hold a noteworthy position in the Greek supermarkets, accounting for about 12% of sales. Greeks are among the biggest cheese consumers in the world, with 22 kgs per capita consumption. Ice cream consumption is seasonal. Average per capita consumption is 5 liters.

Wine - Beer - Juices and Soft Drinks: According to a recent study, wine, beer, juice and soft drinks enterprises are forecast to operate under conditions of heavy competition in the immediate years to come, as the market is characterized by a quest for new products and new brand names, and as demand levels appear to have reached their peak. In general terms, the Greek wine market is again registering positive rates of growth, though the beer market is rather stagnant, while the juice and soft drink market growth is also evident. Soft drinks are claiming a place as an accompaniment to food - a position traditionally held by wine and beer - while beer is displacing some soft drink consumption, especially during the warmer months.

Wine production in Greece was 400-410 million liters per year from 1995-1997, of which 80% was white wine production. Greeks prefer the white wines (75%), followed by red wines (20%). The average per capita wine consumption is 31.4 liters, compared to 30.5 liters a couple of years earlier. Domestic beer production reached 3,813 million liters. The more than 130 imported beer brands, cover the 6% of the market. The Greek juice and soft drink market has been characterized by continual growth over the past decade. More specifically, for the period 1999-2000 the rate of growth in consumption is forecast to fluctuate in the 2-4% range for juices and the 2-3% range for soft drinks. Consumption in 1997 reached 177,000 liters.

Seafood: Greece ranks fifth in per capita fish consumption in the EU at 24 kgs. Frozen fish consumption has increased 15% in the last few years. The total market size is 230,000 MT. First in preference is codfish. Greece is among the largest importers of frozen squids from the States. Frozen fish faces competition from local fish farms. Fish farming, one of the most dynamic sectors of the Greek food industry, is entering a new phase of growth. The Total EU seabass and gilthead production in 1999 is estimated at 83,000 tons, of which 50% is accounted for Greek production.

Energy drinks: Isotonic and energy drinks, which make up a new category of soft drinks, first appeared in the Greek market in 1992. A significant effort has recently been undertaken by producer and trading companies in order to raise these products' market share, which is presently much lower than average EU consumption. Isotonic and energy drinks are imported into Greece both from EU and the U.S.

Pulses: Mainly lentils and beans, have a good potential in the Greek market. Declining domestic production, coupled with the fact that pulses are considered a healthy food, favor imports. The total pulse market size is 45,000 tons, of which 13,500 tons are lentils.

Organic foods, which made their appearance recently, seem to be subject to growing demand. The demand of dietary and health food products remains stable, although limited. Growth is expected by the year 2003. This demand is, to a large extent, dependent on trends and advertising. The total market size is about 5 billion drachmae per year.

Ordering food at home is also common in Athens, especially for middle to upper income people between 18-40 years old. Few consumers buy their meals from the supermarket.

The selling factors and techniques that are applicable to Greece are generally the same as those in other western European countries and the United States. Advertising and sales promotion are usually handled by one of many local advertising companies. Advertising companies use all types of media to reach target groups.

Direct marketing is limited used in Greece, although there are a few small mail or telephone order services. The practice of gift giving in the business sector has become an institution, which can be taken advantage of via marketing and public relations.

Internet sales and electronic shopping are still not very common in Greece. However, a couple of supermarket chains have started receiving orders through their customers' computers.

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

Greek market provides best prospects for the following products:

- Seafood products - mainly frozen
- Nuts
- Meat - fresh, chilled, frozen
- Frozen foods (vegetables, french fries, dough)
- Dairy products (yogurt, ice cream)
- Vegetable oils (mainly corn)
- Snack foods - salted and sweet
- Pulses
- Beer
- Wine
- Cereals
- Organic products

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

The Supreme Chemical Laboratory
General State Chemical Laboratory
Mrs. Angeliki Assimakopoulou, Director General
16, Anastasiou Tsoha Str.
GR-115 21 Athens, Greece
Tel. ++30-1-6479.000
Fax: ++30-1-6466.229

Ministry of Agriculture
Mr. Evangelos Tsekouras, Secretary General, EU and International Matters
5, Aharnon Str.
GR-101 76 Athens
Tel. ++30-1-5246.740
Fax: ++30-1-5240-955

American-Hellenic Chamber of Commerce
Mr. Sotiris Yiannopoulos, Executive Director
16, Kanari Str.
GR-106 74 Athens
Tel. ++30-1-3623.231
Fax: ++30-1-3610.170

Athens Association of Commercial Agents
Mr. Paul Yiannakopoulos, President
15, Voulis Str.
GR-105 63 Athens
Tel. ++30-1-3232-622
Fax: ++30-1-3238-378

Union of Supermarket Business
Mr. George Zarouhliotis, Director
37, Pireos Str.
GR-105 53 Athens
Tel. ++30-1-3217-510
Fax: ++30-1-3212-364

APPENDIX I. STATISTICS

A. KEY TRADE AND DEMOGRAPHIC INFORMATION

| | |
|---|--------------|
| Agricultural Imports from All Countries (\$Mil) / U.S. Market Share (%) ^{1/} | \$4,326 / 4% |
| Consumer Food Imports from All Countries (\$Mil) / U.S. Market Share (%) ^{1/} | \$2,458 / 1% |
| Edible Fishery Imports From All Countries (\$Mil) / U.S. Market Share (%) ^{1/} | \$283 /2% |
| Total Population (Millions) / Annual Growth Rate (%) | 10.6 / 0.5% |
| Urban Population (Millions) / Annual Growth Rate (%) | 7.0 / 0.2% |
| Number of Major Metropolitan Areas ^{2/} | 1 |
| Size of the Middle Class (Millions) / Growth Rate (%) ^{3/} | 6.5 / 0.2% |
| Per Capita Gross Domestic Product (U.S. Dollars) | \$11,500 |
| Unemployment Rate (%) | 10.4% |
| Per Capita Food Expenditures (U.S. Dollars) | \$2,650 |
| Percent of Female Population Employed ^{4/} | 40% |
| Exchange Rate (US\$1 - Drachmae) | 325.28 |

Footnotes

^{1/} Use FAS's web-enabled UNTrade database (HS -digit option; Import Market Share BICO 3-Year format)

^{2/}Population in excess of 1,000,000

^{3/} Middle Class Income: \$19,000-28,000 annual earnings

^{4/} Percent against total number of women (15 years old or above)

B. CONSUMER FOOD AND EDIBLE FISHERY PRODUCT IMPORTS

| Greece Imports (In Millions of Dollars) | Imports from the World | | | Imports from the U.S. | | | U.S Market Share | | |
|--|------------------------|--------------|--------------|-----------------------|------------|------------|------------------|----------|----------|
| | 1996 | 1997 | 1998 | 1996 | 1997 | 1998 | 1996 | 1997 | 1998 |
| CONSUMER-ORIENTED AGRICULTUR. | 2,585 | 2,317 | 2,469 | 27 | 28 | 19 | 1 | 1 | 1 |
| Snack Foods (Excl. Nuts) | 128 | 114 | 113 | 1 | 1 | 1 | 0 | 1 | 1 |
| Breakfast Cereals & Pancake Mix | 16 | 18 | 20 | 1 | 1 | 0 | 0 | 0 | 0 |
| Red Meats, Fresh/Chilled/Frozen | 738 | 700 | 720 | 1 | 1 | 1 | 0 | 0 | 0 |
| Red Meats, Prepared/Preserved | 41 | 38 | 39 | 1 | 1 | 0 | 1 | 0 | 0 |
| Poultry Meat | 64 | 56 | 77 | 2 | 1 | 1 | 3 | 1 | 0 |
| Dairy Products (Excl. Cheese) | 330 | 278 | 300 | 1 | 1 | 1 | 0 | 0 | 0 |
| Cheese | 266 | 242 | 261 | 0 | 0 | 0 | 0 | 0 | 0 |
| Eggs & Products | 13 | 11 | 14 | 0 | 0 | 1 | 0 | 0 | 0 |
| Fresh Fruit | 129 | 102 | 118 | 1 | 1 | 1 | 1 | 0 | 1 |
| Fresh Vegetables | 56 | 47 | 62 | 1 | 0 | 0 | 0 | 0 | 0 |
| Processed Fruit & Vegetables | 128 | 109 | 136 | 2 | 1 | 2 | 2 | 1 | 1 |
| Fruit & Vegetable Juices | 39 | 32 | 41 | 3 | 3 | 2 | 8 | 10 | 6 |
| Tree Nuts | 50 | 57 | 41 | 10 | 11 | 5 | 20 | 20 | 13 |
| Wine & Beer | 45 | 43 | 48 | 3 | 4 | 2 | 6 | 8 | 3 |
| Nursery Products & Cut Flowers | 50 | 43 | 48 | 1 | 1 | 1 | 0 | 0 | 0 |
| Pet Foods (Dog & Cat Food) | 30 | 34 | 44 | 1 | 2 | 2 | 5 | 5 | 5 |
| Other Consumer-Oriented Products | 461 | 394 | 387 | 4 | 4 | 4 | 1 | 1 | 1 |
| FISH & SEAFOOD PRODUCTS | 281 | 282 | 286 | 7 | 9 | 2 | 2 | 3 | 1 |
| Salmon | 6 | 5 | 6 | 1 | 1 | 1 | 4 | 4 | 4 |
| Surimi | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| Crustaceans | 33 | 25 | 27 | 4 | 5 | 1 | 13 | 19 | 0 |
| Groundfish & Flatfish | 85 | 77 | 76 | 1 | 0 | 1 | 0 | 0 | 0 |
| Molluscs | 69 | 81 | 78 | 1 | 4 | 2 | 2 | 5 | 2 |
| Other Fishery Products | 88 | 93 | 97 | 1 | 1 | 1 | 1 | 1 | 0 |
| AGRICULTURAL PRODUCTS TOTAL | 3,863 | 3,469 | 3,670 | 145 | 151 | 122 | 4 | 4 | 3 |
| AGRICULTURAL, FISH & FORESTRY T | 4,489 | 4,091 | 4,338 | 176 | 183 | 148 | 4 | 4 | 3 |

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

**C. TOP 15
SUPPLIERS OF CONSUMER FOODS
AND EDIBLE FISHERY PRODUCTS**

CONSUMER-ORIENTED AGRICULTURAL TOTAL - 400

| Reporting:Import | Import | Import | Import |
|------------------|-----------|-----------|-----------|
| | 1996 | 1997 | 1998 |
| | Value | Value | Value |
| | 1000\$ | 1000\$ | 1000\$ |
| Netherlands | 692,630 | 564,462 | 579,520 |
| France | 433,250 | 466,285 | 477,247 |
| Germany | 325,109 | 286,563 | 321,065 |
| Italy | 248,220 | 202,842 | 280,728 |
| Belgium | 162,804 | 157,731 | 161,642 |
| Denmark | 147,348 | 130,738 | 138,273 |
| Spain | 67,823 | 69,834 | 93,313 |
| United Kingdom | 68,400 | 80,102 | 79,140 |
| Cote d'Ivoire | 63,303 | 44,972 | 44,558 |
| Ireland | 99,672 | 33,365 | 34,124 |
| Sweden | 8,388 | 17,359 | 22,676 |
| Austria | 16,182 | 15,496 | 21,011 |
| New Zealand | 20,334 | 23,051 | 20,337 |
| Turkey | 24,779 | 24,406 | 19,974 |
| United States | 27,093 | 28,238 | 19,011 |
| Other | 179,574 | 171,518 | 156,619 |
| World | 2,584,919 | 2,316,973 | 2,469,252 |

FISH & SEAFOOD PRODUCTS - 700

| Reporting:Import | Import | Import | Import |
|------------------|---------|---------|---------|
| | 1996 | 1997 | 1998 |
| | Value | Value | Value |
| | 1000\$ | 1000\$ | 1000\$ |
| Italy | 36,163 | 43,460 | 47,893 |
| Spain | 16,577 | 18,279 | 22,709 |
| Morocco | 16,175 | 14,392 | 17,592 |
| Netherlands | 15,598 | 16,886 | 17,525 |
| Denmark | 18,883 | 20,845 | 17,449 |
| Senegal | 18,018 | 16,356 | 14,692 |
| India | 18,820 | 15,762 | 14,382 |
| Germany | 8,382 | 8,014 | 9,126 |
| Sweden | 1,192 | 2,122 | 8,840 |
| Argentina | 10,027 | 10,182 | 8,620 |
| New Zealand | 2,515 | 5,333 | 7,857 |
| Turkey | 4,610 | 8,264 | 7,272 |
| France | 7,414 | 7,079 | 6,463 |
| United Kingdom | 7,819 | 5,943 | 6,446 |
| Macedonia | 3,501 | 4,856 | 5,272 |
| Other | 95,497 | 84,522 | 73,475 |
| World | 281,198 | 282,295 | 285,601 |

Source: United Nations Statistics Division

CONSUMER-ORIENTED AGRICULTURAL TOTAL - 400

| Reporting:Import | Import | Import | Import |
|------------------|-----------|-----------|-----------|
| | 1996 | 1997 | 1998 |
| | Value | Value | Value |
| | 1000\$ | 1000\$ | 1000\$ |
| Netherlands | 692,630 | 564,462 | 579,520 |
| France | 433,250 | 466,285 | 477,247 |
| Germany | 325,109 | 286,563 | 321,065 |
| Italy | 248,220 | 202,842 | 280,728 |
| Belgium | 162,804 | 157,731 | 161,642 |
| Denmark | 147,348 | 130,738 | 138,273 |
| Spain | 67,823 | 69,834 | 93,313 |
| United Kingdom | 68,400 | 80,102 | 79,140 |
| Cote d'Ivoire | 63,303 | 44,972 | 44,558 |
| Ireland | 99,672 | 33,365 | 34,124 |
| Sweden | 8,388 | 17,359 | 22,676 |
| Austria | 16,182 | 15,496 | 21,011 |
| New Zealand | 20,334 | 23,051 | 20,337 |
| Turkey | 24,779 | 24,406 | 19,974 |
| United States | 27,093 | 28,238 | 19,011 |
| Other | 179,574 | 171,518 | 156,619 |
| World | 2,584,919 | 2,316,973 | 2,469,252 |

FISH & SEAFOOD PRODUCTS - 700

| Reporting:Import | Import | Import | Import |
|------------------|---------|---------|---------|
| | 1996 | 1997 | 1998 |
| | Value | Value | Value |
| | 1000\$ | 1000\$ | 1000\$ |
| Italy | 36,163 | 43,460 | 47,893 |
| Spain | 16,577 | 18,279 | 22,709 |
| Morocco | 16,175 | 14,392 | 17,592 |
| Netherlands | 15,598 | 16,886 | 17,525 |
| Denmark | 18,883 | 20,845 | 17,449 |
| Senegal | 18,018 | 16,356 | 14,692 |
| India | 18,820 | 15,762 | 14,382 |
| Germany | 8,382 | 8,014 | 9,126 |
| Sweden | 1,192 | 2,122 | 8,840 |
| Argentina | 10,027 | 10,182 | 8,620 |
| New Zealand | 2,515 | 5,333 | 7,857 |
| Turkey | 4,610 | 8,264 | 7,272 |
| France | 7,414 | 7,079 | 6,463 |
| United Kingdom | 7,819 | 5,943 | 6,446 |
| Macedonia | 3,501 | 4,856 | 5,272 |
| Other | 95,497 | 84,522 | 73,475 |
| World | 281,198 | 282,295 | 285,601 |

Source: United Nations Statistics Division